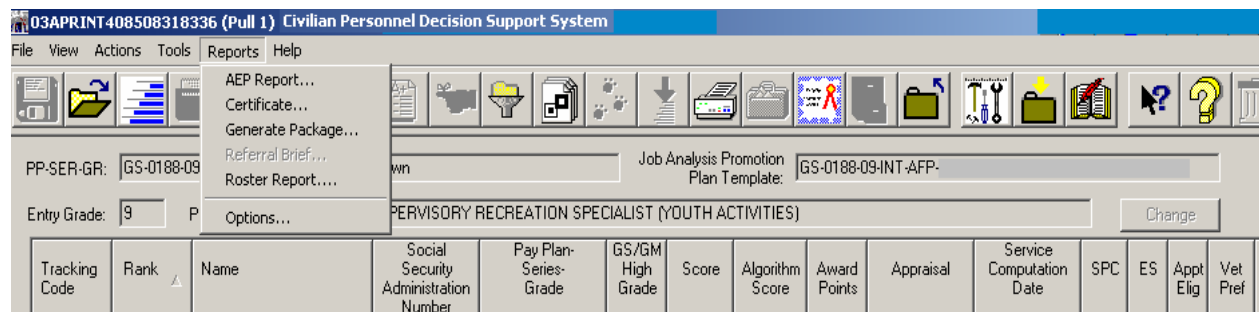
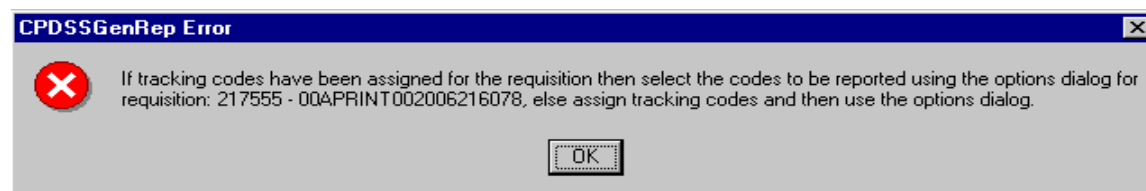


Chapter 7 - Generating a Referral Certificate and Referral Certificate Package

The Air Force Candidate Referral Certificate is designed to create certificates based on assigned Tracking Codes. To create a Referral Package or generate a Referral Certificate the first step is to go to the **Reports > Options** area of main menu.



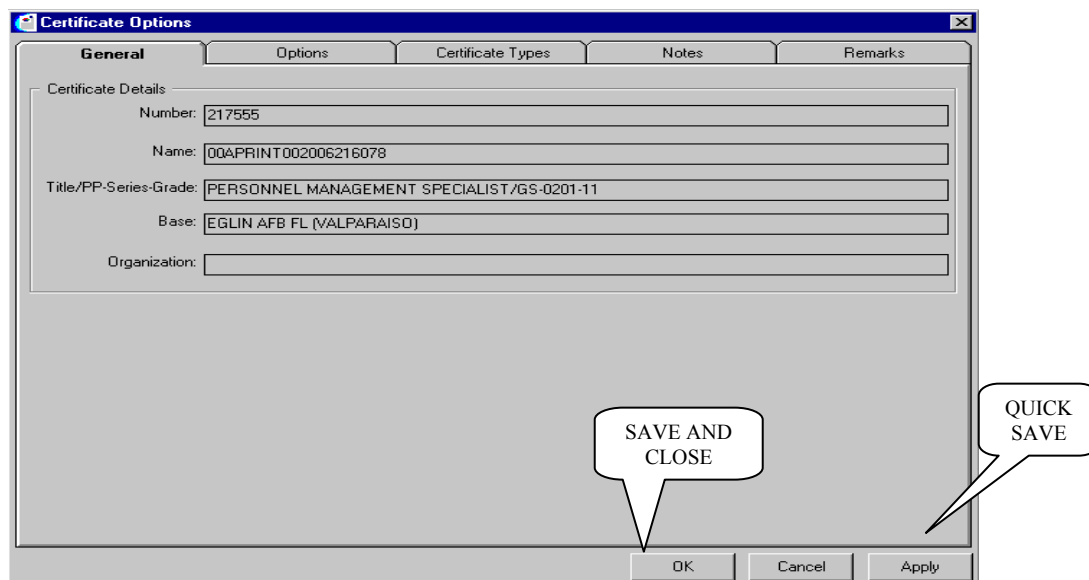
Note: When accessing the **Reports** menu, an attempt to generate a Certificate or a Package without completing the required Certificate Options Dialogue window will cause the following dialog box to appear.



After selecting **Options** from the **Reports** area, the **Certificate Options** Window will appear. There are five tabs on this screen that are used to prepare the certificate package.

General

This tab is 'read only' and shows information that has been imported from the Resumix Requisition.



Options

This tab is used to add or modify information for the certificate.

The screenshot shows the 'Certificate Options' dialog box with the 'Options' tab selected. The dialog has several sections: 'Certificate' with fields for Issue Date, Expiration Date, Bargaining Unit, Position Type, PATCOB, and No. of Vacancies; 'Additional Info.'; 'Certifying Official' with Name and Title fields; and 'Selecting Official' with Name, Phone, Office Symbol, and E-Mail Address fields. A 'Default...' button is at the bottom right. A calendar pop-up is visible over the Expiration Date field, showing June 2002 with the 19th highlighted. Annotations include a blue oval around the 'Additional Info.' field, another blue oval around the 'Certifying Official' section, and a larger blue oval around the 'Selecting Official' section. Two callout boxes with arrows point to the Expiration Date field: one says 'Make sure to change the Expiration Date' and the other says 'A calendar can be accessed using the drop-down menu.'

Make sure to change the Expiration Date

A calendar can be accessed using the drop-down menu.

Certificate Options

General **Options** Certificate Types Notes Remarks

Certificate

Issue Date: 19-Jun-2002 Expiration Date: 19-Jun-2002

Bargaining Unit: AF2350 PATCOB: June 2002

Position Type: 1 - Competitive Service No. of Vacancies:

Additional Info.:

Certifying Official

Name: Title:

Selecting Official

Name: Phone:

Office Symbol: E-Mail Address:

Default...

OK Cancel Apply

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today: 6/19/2002

Certificate Types

This tab is used to select which candidates will appear on the certificate based on Tracking Codes and the order in which the list of names will appear. The candidate must have been assigned the Tracking Code(s) selected for the certificate to appear on the certificate. **Note:** A separate referral certificate will generate for each Tracking Code that is selected. The only exception to this is the "Certificate of Eligibles" used for DEU referrals.

Select Sort Order: Candidates can be sorted either by last name or by rank.

Select Attachments: Civilian Referral Briefs can only be selected when the Certificate Type Is Internal

Select Certificate Type: Certificate Type is determined by the option selected under 'Select Certificate Type'.

Track Code/Description: All the Tracking Codes assigned on the Candidate Referral Roster (CRR) will be listed here. Select the code(s) to use to generate a Referral Certificate(s). In the example, certificates will be generated on those individuals with Tracking Codes of "RFC" and "RFP".

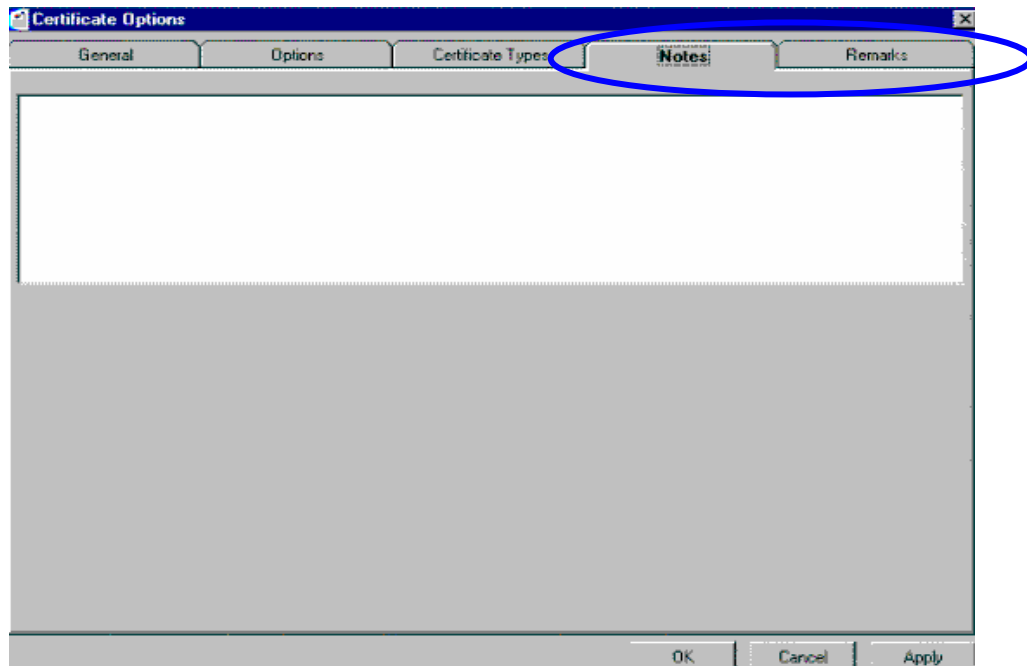
Track Code	Description
<input checked="" type="checkbox"/> RFC	Voluntary Change to Lower Grade Consideration
<input checked="" type="checkbox"/> RFP	Promotion Consideration
<input type="checkbox"/> RFR	Reassignment Consideration
<input type="checkbox"/> RSC	Supplement - Voluntary Change to Lower Grade Consideration

NOTES:

- **Civilian Referral Briefs:** Only available for internal candidates. This feature will not be used when an External certificate is selected.
- **Resume Text:** (All external candidates).
- **CONUS AEP:** (If required, use for positions filled within the Continental United States).
- **Hawaii AEP:** (Use for positions located in Hawaii).

The **Notes and Remarks** tabs are used to add additional information for the position or candidates on the referral certificate.

NOTE: Information typed in either of these areas will be displayed in either the Notes or Remarks area of the certificate. The maximum number of characters for each of these areas is 500 and a maximum number of lines is 5.



The image shows a screenshot of a software window titled "Certificate Options". The window has a tabbed interface with five tabs: "General", "Options", "Certificate Types", "Notes", and "Remarks". The "Notes" tab is currently selected and is highlighted with a blue oval. Below the tabs is a large, empty text area for entering notes. At the bottom of the window, there are three buttons: "OK", "Cancel", and "Apply".

Generating a Referral Certificate/Package

When the certificate options area is complete, the Referral Certificate or Certificate Package may be generated. To produce only the certificate, select **Reports > Certificate**.

To produce the entire package (Certificate(s), AEP Reports, Resume Text or Career Briefs) select **Reports > Generate Package** from the main menu or use the **Generate Package** button.



Sample of Internal Referral Certificate Package:

Air Force Candidate Referral Certificate		Type of Certificate: Promotion Consideration		
Requisition ID: 02JUL1	Date Issued: 30-Sep-2002	Expiration Date: 30-Oct-2002	BU: AF1690	
		# of vacancies: 1		
Pay Plan - Series - Grade / Position Title: GS-0335-06 / COMPUTER ASSISTANT		Base: POPE AFB / CUMBERLAND / NORTH	Organization: LGL0	
Entry Gr Lvl: 6				
Remarks:				
For Additional Information Call:		PATCOB: CLERICAL	Type of Position: Competitive Service	
Name & Title of Certifying Official:		Signature of Certifying Official:		
Name	PayPlan - Grade	Org/Office Symbol	Phone	Action Code*

Type of Certificate – created based on Tracking Code(s)

Column Headings - **NOTE:** these will vary depending on the Certificate produced

CF
KL
SC

Civilian Referral Brief

CIVILIAN REFERRAL BRIEF						Current as of: 09-Jul-2008
FOR OFFICIAL USE ONLY, CONTAINS INFORMATION SUBJECT TO PRIVACY ACT OF 1974 AS AMENDED. PROTECT ACCORDINGLY.						
Name:			SSN:			
DUTY PHONE:		DUTY LOCATION: Robins AFB Base, Houston, GA				
PP - SERIES - GRADE: GS - 0326 - 03		TITLE: OFFICE AUTOMATION CLERK				
OFF. SYMBOL: LY		OPCH: 96209 OFFICE AUTOMATION CLERK .APPR				
ORGANIZATION: WARNER ROBINS ALC CE		OLLY00 ROBINS AFB GA 31098-00				
DT. START POSH: 02-JAN-2002		BCP: 02-JAN-2002		DT. LAST PROM: 02-JAN-2002		
EXP TYPE: Federal Civil Service		SUPV LEVEL: 8		ACQ CATEGORY: **<No Data> **		ACQ LEVEL: **<No Data> **
ASSGN EFFECTIVE DT: 02-JAN-2002		ASSGN STATUS: Active Assignment		Demo BB:		Demo PP:
SKILL1: OAS		Office Automation Clk/Ast		PERCENTAGE: 100.00		MONTHS: 16.00
EXPERIENCE HISTORY:						
Start Dt.	End Dt.	PP-SERS-GR	Title	ACQ Category	Demo BB	ACQ Level Demo PP
	Exp Type		Supv Level			
	Command					
01-AUG-2001			Equipment Operating			Total Months Experience: 5.42
	Non-Federal Service		Non-Supervisory	**<No Data> **		**<No Data> **
	**<No Data> **				**<No Data> **	**<No Data> **
	Skill1: LAX		Engineering Equip Optg			Percentage: 100 Months: 5.42
01-AUG-1995			Plumbing			Total Months Experience: 12.03
	Non-Federal Service		Non-Supervisory	**<No Data> **		**<No Data> **
	**<No Data> **				**<No Data> **	**<No Data> **
	Skill1: 2GB		Plumbing			Percentage: 100 Months: 12.03
02-AUG-1991	02-DEC-2000	GS - 0303 -				Total Months Experience: 112.03
	Non-Federal Service		Non-Supervisory	**<No Data> **		**<No Data> **
	**<No Data> **				**<No Data> **	**<No Data> **
	Skill1: AKK / AMH		Clerk/Asst/Technician / Work Order Control & Auth			Percentage: 75 Months: 84.02
	Skill2: AKK / OFS / FIL		Clerk/Asst/Technician / Office Services / Fiscal Liaison			Percentage: 25 Months: 28.01

AEP Report

AFFIRMATIVE EMPLOYMENT INFORMATION

CERTIFICATE NUMBER: 020C* (Pull 1)

TYPE OF CERTIFICATE: Promotion Consideration

TITLE: MECHANICAL ENGINEER

PAY PLAN - SERIES - GRADE: GS-0830-12

The enclosed referral certificate(s) has the following representation:

1 HISPANIC MALES

You may have local goals for the categories below

DEFINITIONS:

DISABLED (NON-TARGET): Persons with medical disability codes greater than 05 as depicted in SF 256 with exception of target codes listed below

DISABLED (TARGET GROUP): persons with medical disability codes 16, 17 (DEAF); 23, 25 (BLIND); 28 and 32-38 (MISSING EXTREMITIES); 64-68 (PARTIAL PARALYSIS); 71-78 (COMPLETE PARALYSIS); 82 (CONVULSIVE DISORDERS); 90 (MENTAL RETARDATION); 91 (MENTAL ILLNESS); 92 (DISTORTION OF SPINE/LIMBS) as depicted on SF 256

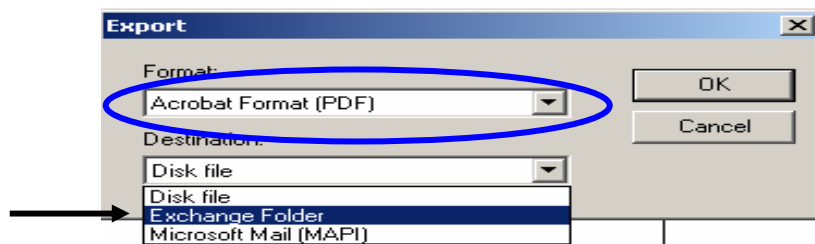
This data may not be available for certificates with non - Air Force Candidates.

FOR OFFICIAL USE ONLY

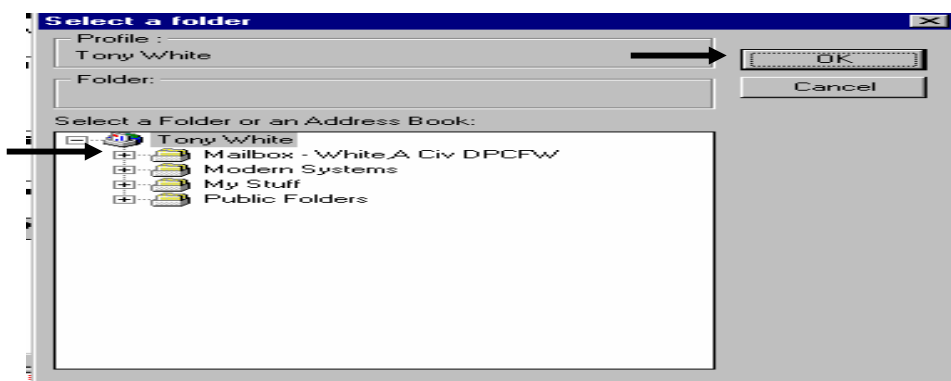
Sending the Package Electronically



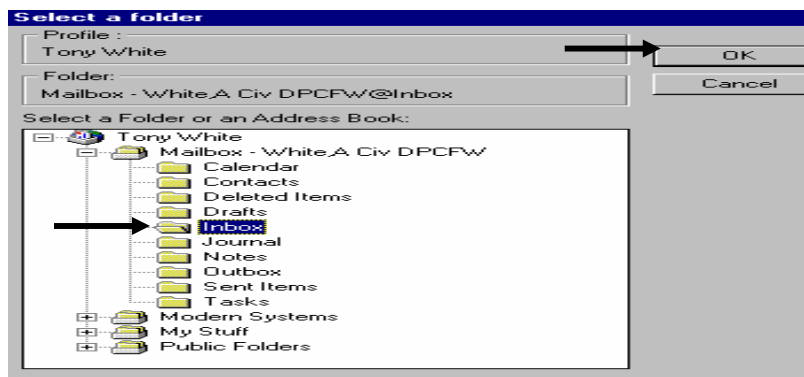
- Select the Open Envelope, the following screen will appear.
- Select **Acrobat Format (PDF)** as the Format.
- Select **Exchange Folder** as the Destination. Click **<OK>**.



- The **Select a Folder** Window will display indicating your exchange profile name. Select your mailbox folder and click **<OK>**.

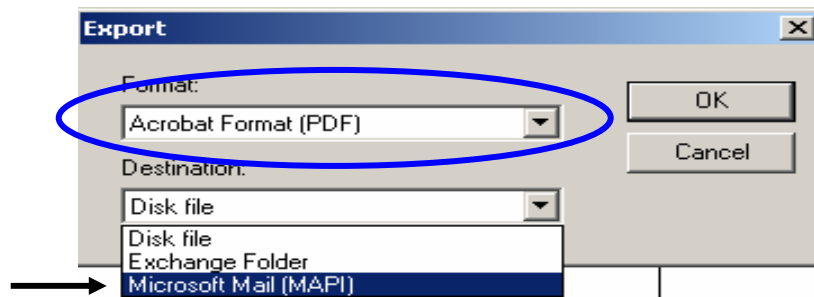


The certificate and all of the identified attachments will flow to your exchange inbox. Select **Inbox** and click **<OK>**.



At this point the document may be open for final review or to add any other required documents/instructions, and forward to the CPF and/or selecting official based on internal procedures for that CPF.

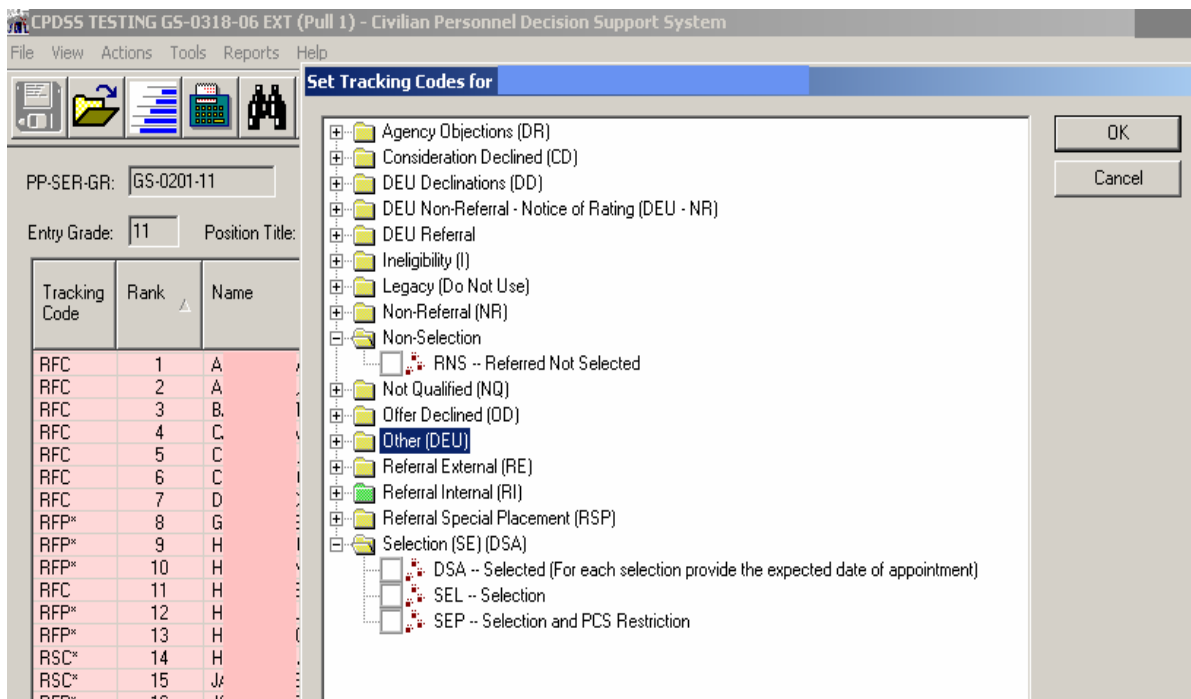
- Or Select **Microsoft Mail (MAPI)** as the Destination. Click **<OK>**. This allows the user to send the email directly to the manager or intended person. Using the MAPI procedure the user can cut and past text information into the message area of the e-mail. E-mail **must be** open to use this method.



NOTE: The certificate or certificate package generated will be “Read Only.”

Return of the Referral Certificate

Once the manager has made a selection(s), the certificate must be returned in hard copy form by fax, mail or hand-carried. When the completed certificate is received, the CRR should be updated to reflect the tracking codes the manager has assigned to the certificate: Selected, Declined, Referred Not Selected, etc.



NOTE: Remember tracking codes only flow automatically to Resumix when one of the following occurs:

- Certificate Generation
- Certificate Package Generation
- Roster Archived

Any subsequent tracking codes applied to the CRR such as Selected and Non-Selected must be manually sent to Resumix. To send the Tracking codes to Resumix click the “Send Tracking” button Or **Actions > Send Tracking code** from the menu.



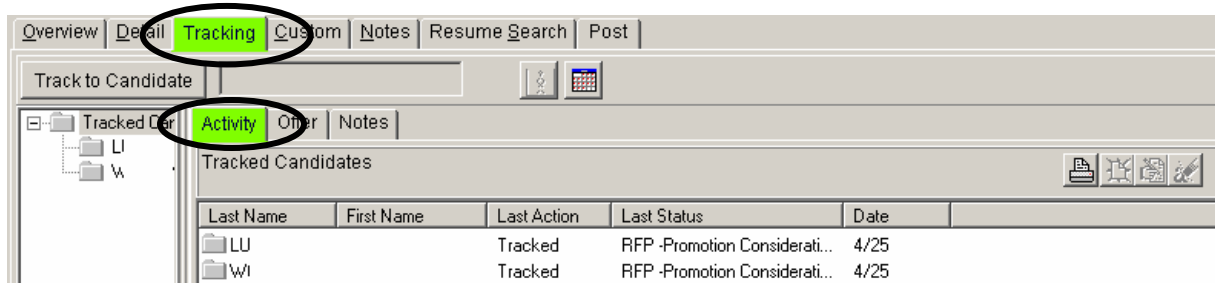
Hiring the Applicant – Updating Resumix

Once the effective date has been established, the staffing specialist has to update Resumix with the following information:

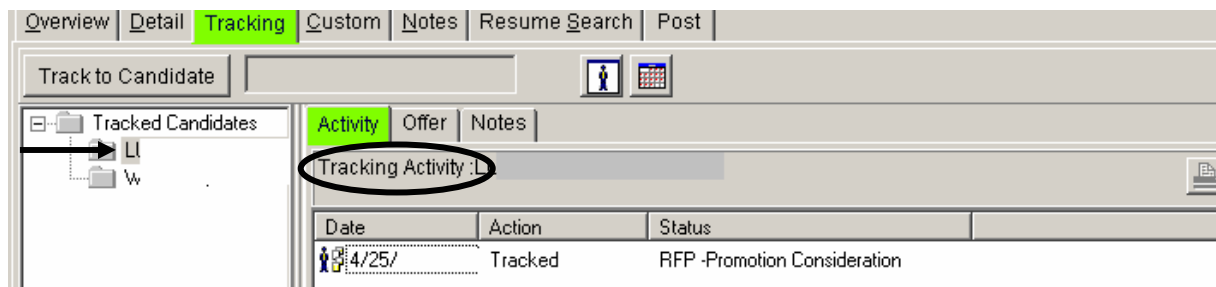
Step 1: Open the Resumix requisition being filled. (Follow the guidance in Chapter 3, Selecting an Existing Requisition.)

Step 2: Click the **Tracking** tab.

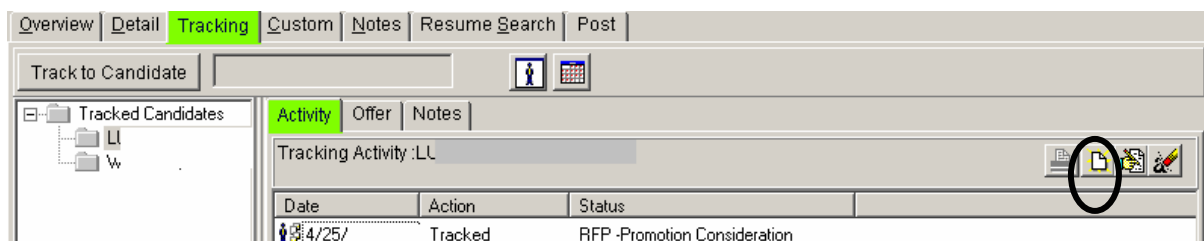
Step 3: Select the **Activity** tab.



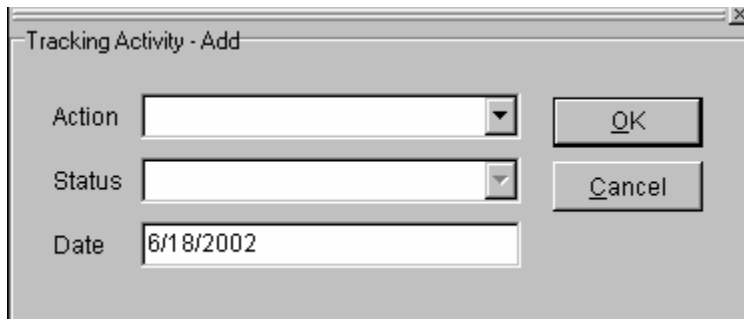
Step 4: Click on the selected applicant. The **Tracking Activity** for that applicant is now viewable.



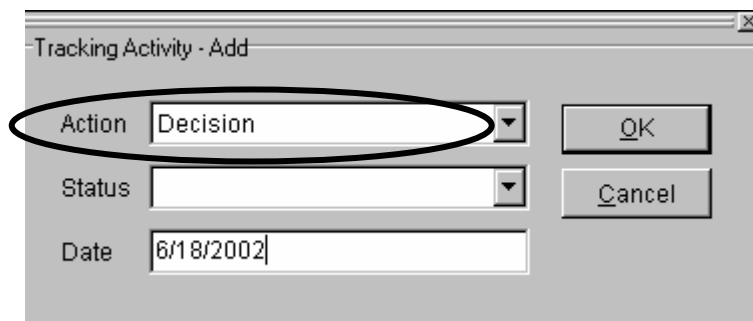
Step 5: Click the “New Action” button. 



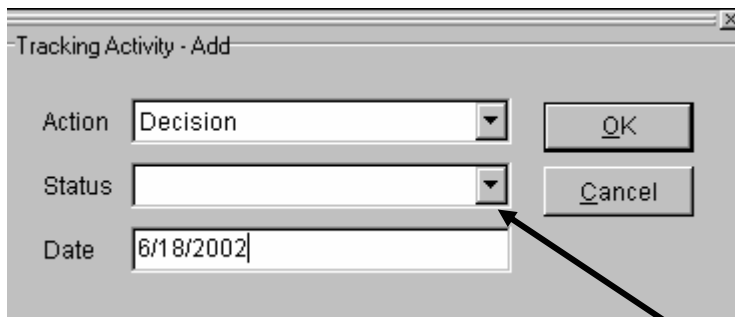
Step 6: The **Tracking Activity – Add** box appears.



Step 7: Using the drop down menu select “**Decision**” as the Action.



Step 8: The “**Status**” field must be completed; however, it is dependent on several different factors.



When finished -
Click **OK**

Review the chart below for the appropriate **Status** code.

Candidate	Currently in DCPDS	Status =
Currently a Permanent Employee (Tenure = 1, 2)	Yes	Internal Accept
Currently a Temporary Employee (Tenure = 0)	Yes	External Accept
Currently serving on an Overseas Limited Appt or Term Appt (Tenure = 3)	Yes	Internal Accept
Not Currently an Employee	No	Accept
Currently an Employee	No	Accept

Decision/Accept



IMPORTANT!!! The staffing specialist will use the **Decision/Accept** Tracking Code only when hiring a candidate that is **not** currently in the DCPDS database. If filling a vacancy with an employee currently in the DCPDS **Decision/Internal Accept** or **Decision/External Accept** should be used.

When the **Decision/Accept** Tracking Code is selected in Resumix, **a new Applicant record is created in DCPDS to be used in the appointment process.** For this reason, the Tracking Code combination (**Decision/Accept**) is only to be used if the selected candidate **is not** currently an Air Force employee (not currently in the DCPDS database).

When the **Decision/Accept** Tracking Code is used, the system automatically

- Changes the applicant's status to **Hired**,
- Changes the position status to **Filled**, if only one (1) vacancy exist, and
- Decreases the Number of Openings by one.

Note: These automatic actions do not occur when you use the Internal Accept or the External Accept Tracking Code. You must change these fields manually.

Step 9: Notice the new entry on the **Tracking Activity** screen for the candidate selected. A similar entry is added when you use Internal Accept or External Accept.

Date	Action	Status
8/13/2003 11:47:2...	Tracked	SEL -Selection
8/13/2003	Decision	Accept
7/24/2003 1:29:22 ...	Tracked	RFP -Promotion Consideration

Date	Action	Status
8/13/2003 11:47:2...	Tracked	SEL -Selection
8/13/2003	Decision	Internal Accept
7/24/2003 1:29:22 ...	Tracked	RFP -Promotion Consideration

Step 10: Update the Resume Summary for the selected candidate. Select the **Resume Summary**

button.

Date	Action	Status
8/13/2003 11:47:2...	Tracked	SEL -Selection
8/13/2003	Decision	Accept
7/24/2003 1:29:22 ...	Tracked	RFP -Promotion Consideration

Step 11: The **Resume Summary** window will appear. Select the **Custom** tab.

The screenshot shows the 'Resume Summary' window with the 'Custom' tab selected. The window has a title bar with 'Requisition - 00FEB000004LDP004764', 'Requisition Search', and 'Resume Summary'. Below the title bar is a toolbar with various icons. The main area has tabs for 'Overview', 'Detail', 'History', 'Tracking', 'Custom' (highlighted), 'Notes', and 'EEO'. A 'Group' dropdown is set to 'GENERAL'. Below this is a table of fields with columns for 'Field', 'Text', 'Date', and 'Numeric'. The 'Resume Expiration' row is circled in blue.

Field	Text	Date	Numeric
Birth Date		5/	
Citizenship	1		
Education Level			17
Lowest Pay Acceptable			21269
Resume Expiration		4/1/1998	
Social Security Number	2		
Temporary Employment	Y		
Typing Speed			15
Veteran Preference			2

Step 12: Under the **General** group, locate **Resume Expiration** custom field. Change the **Resume Expiration** custom field to:

Position Candidate Selected For...	Action to be Taken
Temporary Position (Tenure = 0)	Change the date to current date.
Permanent/Term/Overseas Limited Position (Tenure = 1, 2, or 3)	Delete the resume expiration date.

NOTE: Only external applicants will have resume expiration dates.

Step 13: THIS STEP IS ONLY TO BE USED IF AN EXTERNAL CANDIDATE IS SELECTED FOR A PERMANENT/TERM/OVERSEAS LIMITED APPOINTMENT (TENURE = 1, 2, or 3). Prior to completing this step, you must make sure the DCPDS applicant record has flowed into DCPDS.

- 1) Under **Resume Summary** tab, select **History** tab.
- 2) Place a check ☒ in the **Available** block.
- 3) Change the source code to **INTERNAL**.

Resume Summary -

Overview | Detail | **History** | Tracking | Custom | Notes | EEO

Status

Current: Received ☒ Available

Date	Description
11/26/2001	Received
2/6/2002	Hired

Source

Current: INTERNAL Change To: **INTERNAL**

Date	Code	Description
4/17/2002	INTERNAL	Internal Employee Resumes
11/21/2002	INTERNAL	Internal Employee Resumes

To change:
1 - Click on the folder.
2 - Select **Internal** from the list.
3 - Click **Select** button.
4 - Click the **Change To** button. Current source should read **Internal**.

Under **Resume Summary** tab, select the **Notes** tab.

Insert the following note: Source code changed to internal - placement into permanent position on (enter date).

Requisition Search Resume Summary - Folder -

Overview Detail History Tracking Custom **Notes** EEO

SELECTED FOR: EOD 28 JAN 02. PAR

GUDINAS: 2/6/2003 9:31:38 AM
Source code changed to internal - placement into a permanent position on 04-17-01
SMITHP: 4/17/2002 4:31:07 PM
Deleted VEOA and emailed applicant.
crisph: 2/13/2003 11:02:40 AM

Click the **Save**  button.

- Step 14.** To close a requisition. Open the Detail tab in the requisition; then select the Administrative tab.
- Change the **Status** to the appropriate response by opening the drop down menu and selecting the appropriate status (e.g., Filled/Cancelled/Returned/etc.)
 - If there is more than 1 opening, manually change the number of openings; if there was only 1 opening, the system automatically will change the Filled field to 1 and the Remaining field to 0.

Requisition - 031

Overview **Detail** Tracking Custom Notes Resume Search Post

Administrative Job Department

Recruiter: W

Status: Filled

Date Needed: 3/4/2003

HR Rep:

Openings:

Total	1
Filled	1
Remaining	0

History:

Status	Date
Pending	3/4/2003 9:08
Open	3/5/2003
Filled	3/24/2003

Post: ☒

Budgeted:


Location: CHARLESTON AFB / C

Shift: 1st Shift

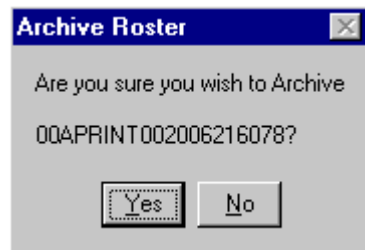
DO NOT UNCHECK ONCE SAVED.

Click the **Save**  button.

Archiving the CRR

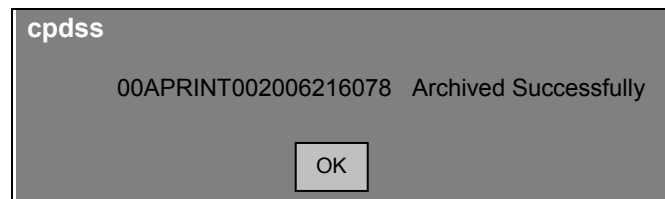
With the CRR open, click the Archive CRR button  or select **Actions > Archive** from the main menu to archive a CRR. The below message will appear to ensure that the user truly wishes to archive the roster.

Click **<Yes>** to continue.



If the archive is successful, the below dialog box will appear.

Click **<OK>**.



The File is Now Archived!!!!!!

Note:

- Once a Case file is archived, the file cannot be manipulated in any way. Only notes may be added.
- A case file can only be archived if the Job Analysis Promotion Plan Template is approved.
- Specialists should archive the case files as soon as possible after EOD but at least within 90 days. Most of the case file documentation will be in CPDSS. To add any additional information to the CRR, copy the information to include in the case file, click **View > Roster Property** and paste the data into the Additional Information area.

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